6/22 - Tuesday P.M. James Cantley

1) Ralphs - Liq P/L

2) AM PM / ARCO (Basic $1.39) GPC $1.49

3) 7-11 Best Buy $ 1.49

4) Ind Liquor Acct GPC $1.69 (Basic $1.49) Monarch $1.49

5) Lucky's (Basic) $1.49.99 — No single packs

6) VON'S

7) SAV-ON-drugs — no discount

8) 7-11 GPC only $1.49

9) Price Club - Monarch · (Basic) priced equally [9.43/9.68]

10) Costco (Basic)

11) 7-11 (3 more) — No Basic Distribution

12) ARCO (Basic)

13) Chevron - (Basic) buried behind other displays $1.49

14) Mobil C-Store (Basic) $1.39 Display / GPC in oth $1.49

15) Hydrolectric - RJR Cavalier $10.99

16) Trifty Oil - Value Pride $1.29

→ BIGI Fell
Will Establish Basic trial/visibility

→ 99¢ ARCO program helped NID '92

→ MAINLY GPC - C stores/Ind

→ RJR P/L - alphabetic
- VON'S (Slim Price)

→ PM P/L out in Super's
Liquet / Reynolds

* Always priced competitively vs. GPC

→ Best Buy owned by Retail disasters
Core MARK tells retailers

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Source: https://www.industrydocuments.ucsf.edu/docs/knby0004

Bill Stahl (Am)

Pam Hall

(3)

Circle K — Austin 99¢ — Cambridge $1.25

GPC $1.19 — Doral $1.75

No Basic — MLP $1.85

ARCO

Basic $10.99

Market $10.09

WALGREENS

Basic $9.99 | $1.09

Diesel 99¢ |

TEXACO

Marlboro $1.87

GPC $1.20

NO BASIC

Smith's

Basic 10.99

GPC 10.39

Best Value

Cambridge $14.99 - $4.00 Coupon

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Source: https://www.industrydocuments.ucsf.edu/docs/knby0004

Phoenix — TINA QUITMAN — 6/23

McCLANE → Premium Brand ← 7-11 → Basic/GPC → BASIC

Discount heavy – RJR — Austin Circle K – other total P/C's

BTW — GPC

Fry's — Smith's — Safeway — Smith's — Ab's — Best's

Sandoval (RJR) — Sebring (RJR) — Scotch Buy (RJR) — Basic GPC — Market (RJR) — Best Value Basic GPC

Basic — Basic — ↓ Basic

[GPC → $1.50 – 2.00 (auction) Coupons, in Supermarkets → 50¢ plates]

Best Value → Texaco

99¢ Austin in Circle K

GPC $1.19

Basic $1.09 – 1.12

Coremark (Corona) → Best Buy

Texaco

Oscio Dy

Some 7-11's

20601875?2

6/23 Wed A.M. Marty Kosar (LA)

Problem with Core Hall passing along $ allowances

Comments

SATCO Distributing - primarily supply sub-jobbers / Carry Generics

Cambridge Couponing Minimal - No getting anything

- MLP execution "nightmare"
- generics slow relative to OPC → Need stable pricing (on net basis of allowances). OPC bought down at retail.
- Liquor store (East L.A.) - No visibility - no shelf - no managers
- Liquor store (East LA) Basic $9/30 OPC $9/30 Marlboro $12/90

Retailers dig the way they get product → Small chain's likely to go out

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Source: https://www.industrydocuments.ucsf.edu/docs/knby0004